

PRV – Call Center Unit Lead Queue

Purpose:

To work all documents in the unit lead queue. Staff sends documents to the unit lead queue for correspondence that requires supervisory review.

Identification of Roles:

Quality Assurance (QA) Coordinator, Trainer, Supervisor, Manager

Performance Standards:

Expectation-worked within 48 hrs

Path of Business Procedure:

Step 1: Log on to OnBase Client

Step 2: Choose “User” then “Workflow” from the task bar at the top of screen

Step 3: Click on the “Life Cycle View” tab

- a. Select “PRV02”
 1. Double click on “PRV02-Customer Service Representative (CSR) Unit Lead”

Step 4: Select the correspondence

- a. Double click to the attach note to view the comments

Step 4: Review the comment or question and research

Step 5: Double click the yellow post it note icon once research is completed

Step 6: Click on “PRV Note from Unit Lead”

- a. Click on the OK button

Step 7: Annotate your findings to the question

- a. Return to the agent

Forms/Reports:

N/A

RFP References:

6.4.2.3.c

Interfaces:

OnBase
Unit Lead
Providers

Attachments:

Process Map

Attachment A:

UNIT LEAD QUEUE

AGENT

